CaER
Customer and Employee Relations

Training, Organization Development & Conference Survey Reference Guide

7/02 JH

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General Questions & Answers

What is this tool and how is it used?
The needs assessment is used to collect information about projected training, organization development and conference requirements. The center Employee & Organization Development Department (EODD) uses the data to identify and prioritize developmental activities for the center. The data is also available to organizations for workforce development purposes.

Who should input into the tool?
All employees are encouraged to input their projected developmental needs into the tool. Alternately, organizations may elect to designate one or more employees to input their requirements.

What if I am a contract team member?
The primary audience for the tool is civil service employees; however, contract team members are welcome to use the tool. Collected information will be considered for those programs, which contract employees, are eligible. When identifying their organization, contract team members should first select the directorate/staff office that they support and then select the “contractors” option from the department pull down menu.

Why should I bother participating?
By participating in the assessment, you provide the Employee & Organization Development Department (EODD) and your organization with information to help plan for and meet your developmental requirements. Assessment results are used to allocate funds for center-sponsored training programs, conferences, academic studies, organization development interventions and other performance improvement activities. In many instances, assessment participants receive advance notice and/or priority consideration for developmental activities identified via the tool.

How long do I have to provide my input?
Each summer the assessment is open for a two-week timeframe. The data collection period can be extended, if circumstances warrant. Contact the Employee & Organization Development Department (EODD) at 544-2622 for additional information.

What if several employees in my organization need the same program?
If 10 or more people in your organization have an identical requirement, an organization request may be initiated. Organization requests eliminate the need to input identical entries for multiple employees.

How can I see what information has been input?
Users can view their input at any time via a variety of reports. Each report contains real-time data and includes several filter and sort options. Custom reports are also available from the Employee & Organization Development Department (EODD) at 544-2622.

What if I make a mistake?
The Employee & Organization Development Department (EODD) will automatically correct obvious errors at the end of the assessment timeframe. If the error is not obvious, or you simply would like the entry modified prior to the conclusion of the assessment, contact EODD at 544-2622.

How does this tool relate to my individual development plan?
Employees with existing Individual Development Plan (IDP) should use this document to help them respond to the assessment. If you do not have an existing IDP, one will automatically be generated for you when you complete the assessment.

Does my organization have an opportunity to review submitted data?
Yes. At the conclusion of the assessment, collected data will be provided back to organizations for review and validation. The Employee & Organization Development Department (EODD) will work with organizations to implement their validated, priority requirements.

If I request a program via the tool, am I automatically registered for it?
No. The tool is used for planning purposes. It does not register participants for developmental activities. In most instances, users will receive priority notification and/or consideration if programs they request are scheduled.

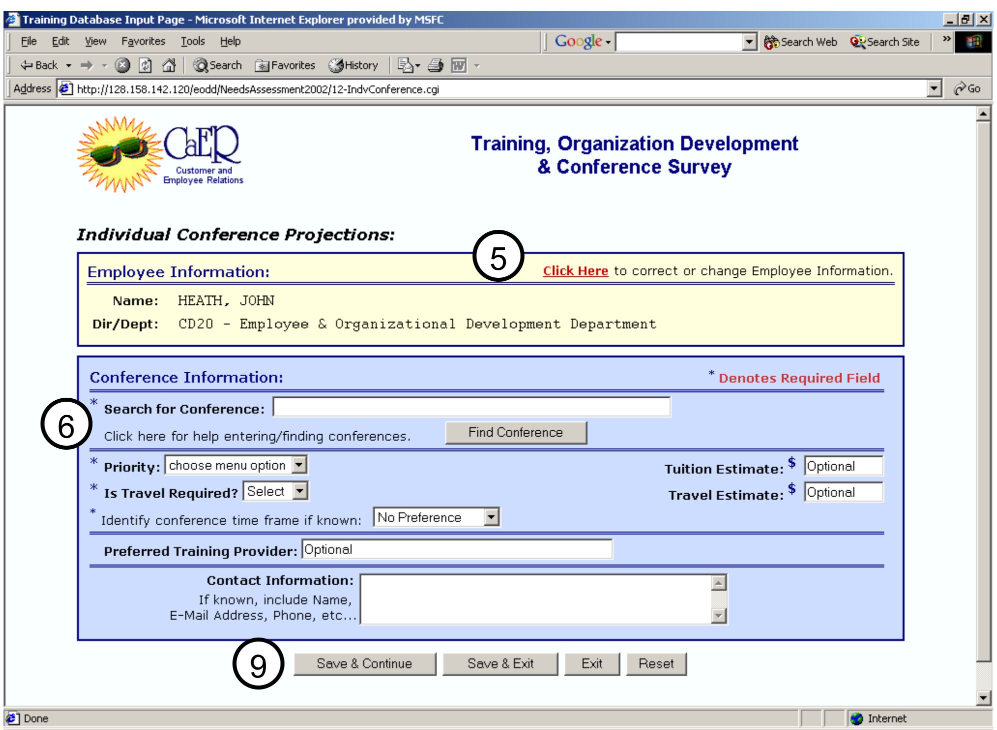
If I experience difficulties using the tool, whom should I contact?
Contact the Employee & Organization Development Department (EODD) at 544-2622.

Input Individual Training Projections

1. Click option 1 “View individual requirements”.
2. Enter your first name and last name.
3. Select your directorate and department from the provided pull down menus. Click the “Individual Requirements” button to continue.
4. Click option 1 (input individual training projections).
5. Verify that your name and organization information is correct. If changes are required, click the “Click here to change employee information” link, then repeat steps 2 through 4.
6. Type in a portion of a course name or choose a group of courses from the “Select Special Program” pull down menu, then press the “Find Course” button.
7. Select the radio button next to the course that you wish to identify a requirement for. You may view a description of the course by clicking on the course title. If a required course is not listed, you may close the window and repeat the process or simply type in the program name in the “Course” field.
8. Complete the remaining fields, using pull down menus where provided. All items marked with an asterisk are required.
9. Click on the “Save and continue” button to save the entry and input another training requirement. Click on the “Save and Exit” button to save the entry and return to the “Individual Input Screen”. Click on the “Exit” button to leave the screen without saving the entry. Click on the “Reset” button to clear all values.

Input Individual Conference Projections

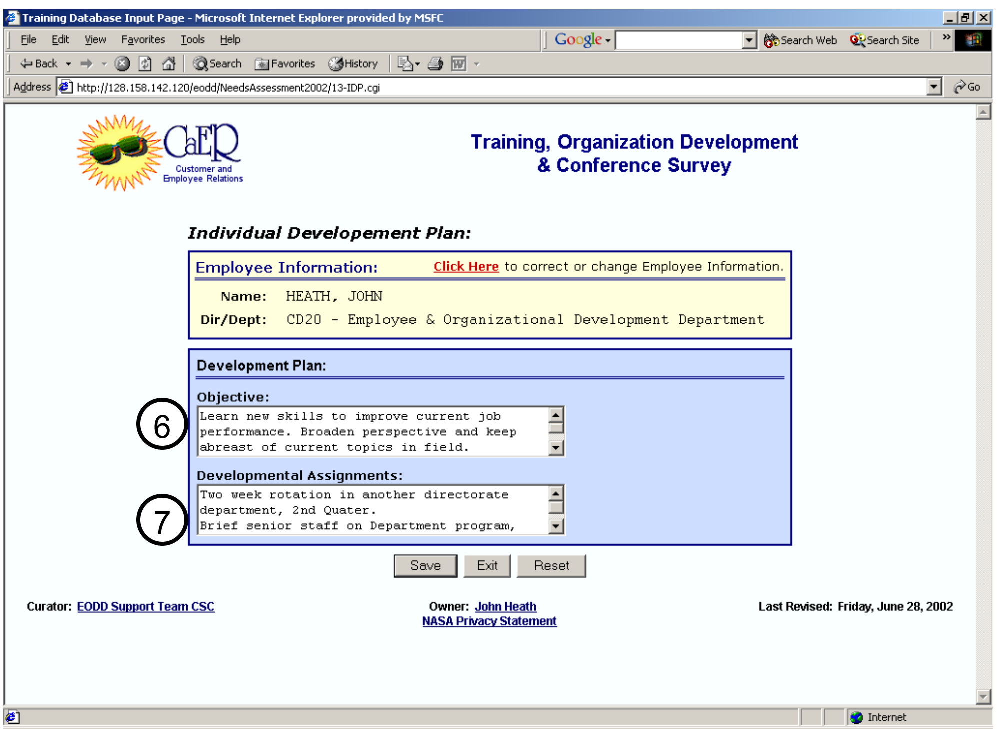
1. Click option 1 “View individual requirements”.
2. Enter your first name and last name.
3. Select your directorate and department from the provided pull down menus. Click the “Individual Requirements” button to continue.
4. Click option 2 (Input individual conference projections).
5. Verify that your name and organization information is correct. If changes are required, click the “Click here to change employee information” link, then repeat steps 2 through 4.
6. In the conference field, type in a portion of the event name and press the “Find Conference” button.
7. Select the radio button next to the conference that you wish to identify a requirement for. If a required conference is not listed, you may close the window and repeat the process or simply type in the event name in the “Conference” field.
8. Complete the remaining fields, using pull down menus where provided. All items marked with an asterisk are required.
9. Click on the “Save and continue” button to save the entry and input another conference requirement. Click on the “Save and Exit” button to save the entry and return to the “Individual Input Screen”. Click on the “Exit” button to leave the screen without saving the entry. Click on the “Reset” button to clear all values.



Input Individual Development Plan Information

Note: this screen is optional. Data provided will be included on Individual Development Plan (IDP) automatically generated for each survey participant.

1. Click option 1 “View individual requirements”.
2. Enter your first name and last name.
3. Select your directorate and department from the provided pull down menus. Click the “Individual Requirements” button to continue.
4. Click option 3 (Input individual development plan information).
5. Verify that your name and organization information is correct. If changes are required, click the “Click here to change employee information” link, then repeat steps 2 through 4.
6. In the objective field, enter any developmental goals that you have (see sample below).
7. In the developmental assignments field, enter any career broadening experiences that you would like to participate in (see sample below).
8. Click the “Save” button to record the entry and return to the “Individual Input Screen”. Click on the “Exit” button to leave the screen without saving an entry. Click on the “Reset” button to clear all values.



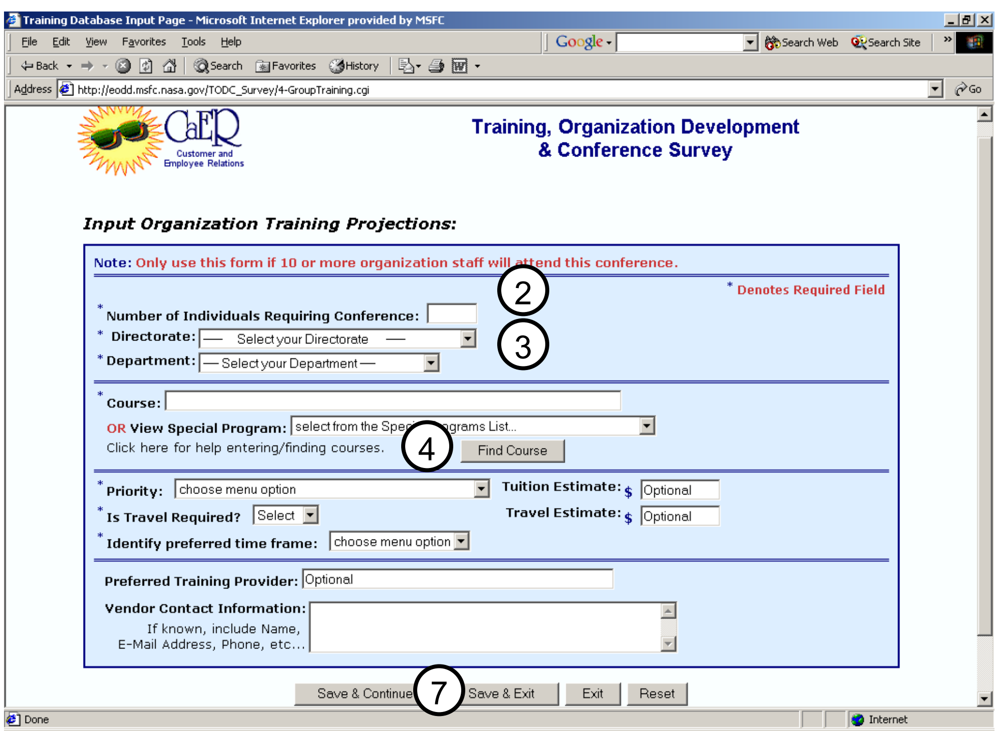
Generate a Report

1. Click on option 2 (View available reports).
2. Select your directorate and/or department from the provided pull down menus. Note: a 'View All' option is also available.
3. Select your preferred sort option.
4. Click the 'View Report' button.

Input Organization Training Projections

Employees authorized by their organization may input group training requirements when 10 or more individuals from their organization have identical requirements. If less than 10 employees require the training, please input these needs as individual projections. To input organization projections:

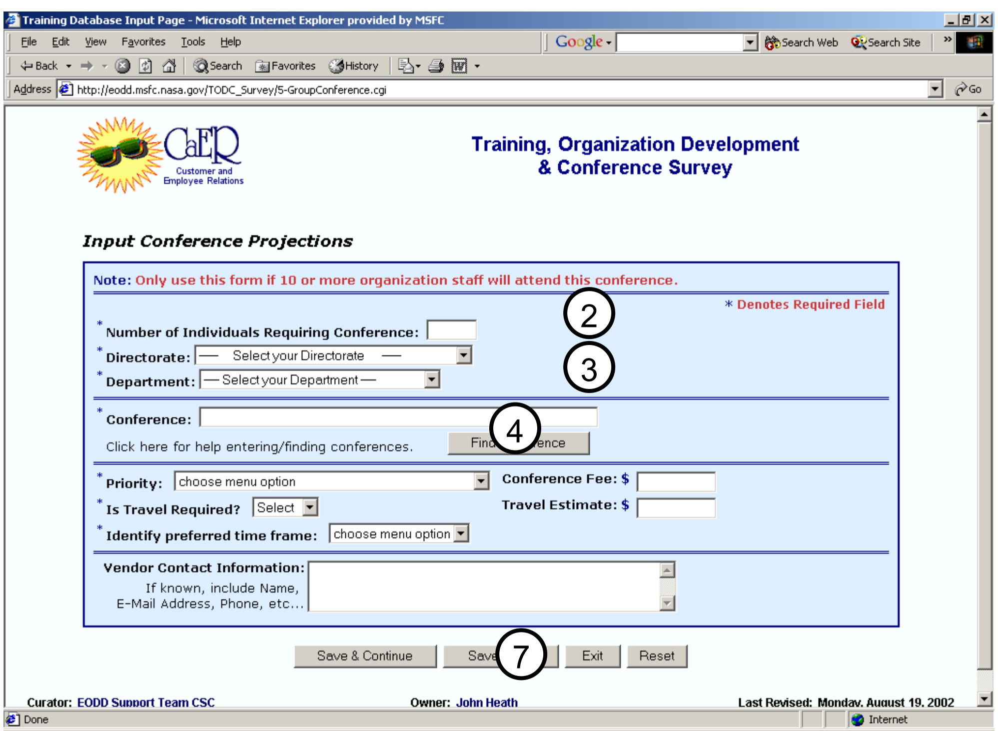
1. Click option 4 (organization training projections).
2. Input the number of individuals that require this training.
3. Select the appropriate directorate and/or department from the provided pull down menus.
4. Type in a portion of a course name or choose a group of courses from the “Select Special Program” pull down menu, then press the “Find Course” button.
5. Select the radio button next to the course that you wish to identify a requirement for. You may view a description of the course by clicking on the course title. If a required course is not listed, you may close the window and repeat the process or simply type in the program name in the “Course” field.
6. Complete the remaining fields, using pull down menus where provided. All items marked with an asterisk are required.
7. Click on the “Save and continue” button to save the entry and input another training requirement. Click on the “Save and Exit” button to save the entry and return to the “Individual Input Screen”. Click on the “Exit” button to leave the screen without saving the entry. Click on the “Reset” button to clear all values.



Input Organization Conference Projections

Employees authorized by their organization may input group conference requirements when 10 or more individuals from their organization have identical requirements. If less than 10 employees require the conference, please input these needs as individual projections. To input organization projections:

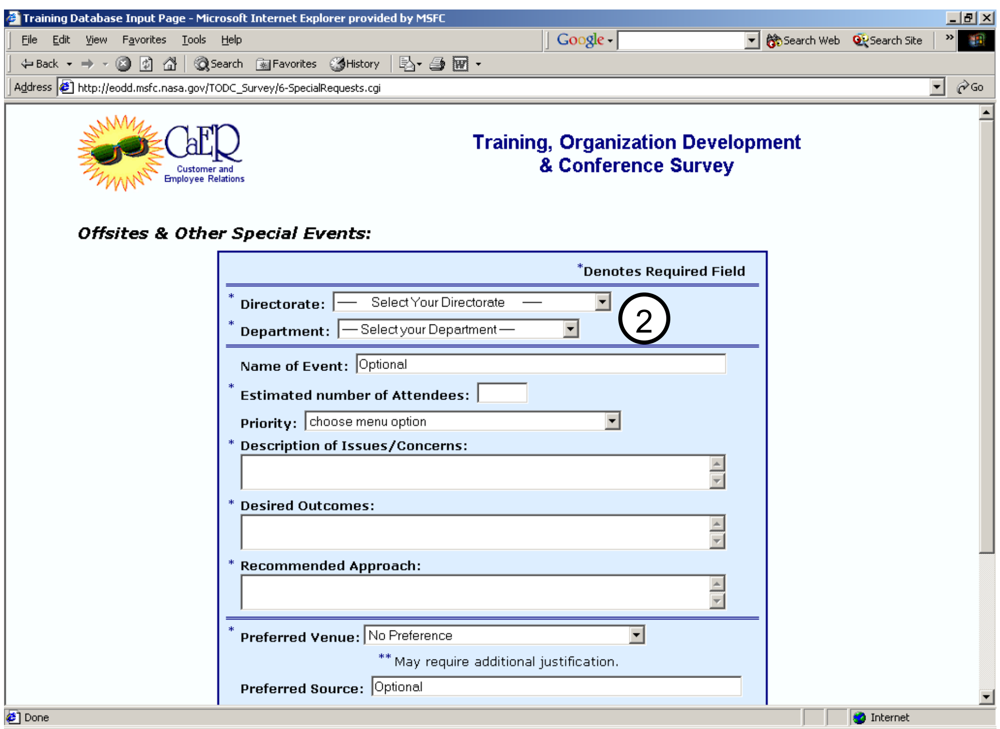
1. Click option 5 (organization conference projections).
2. Input the number of individuals that require this conference.
3. Select the appropriate directorate and/or department from the provided pull down menus.
4. Type in a portion of a the conference name, then press the “Find Conference” button.
5. Select the radio button next to the conference that you wish to identify a requirement for. If a required conference is not listed, you may close the window and repeat the process or simply type in the event name in the “Conference” field.
6. Complete the remaining fields, using pull down menus where provided. All items marked with an asterisk are required.
7. Click on the “Save and continue” button to save the entry and input another training requirement. Click on the “Save and Exit” button to save the entry and return to the “Individual Input Screen”. Click on the “Exit” button to leave the screen without saving the entry. Click on the “Reset” button to clear all values.



Input a Special Request

Special requests include organization-specific training requests or other activities where a clear solution exists (e.g. a specialized training program, an electronic meeting session or the administration of a specific assessment instrument is needed). To input a special request:

1. Click option 6 (Input special requests).
2. Select the appropriate directorate and/or department from the provided pull down menus.
3. Complete the remaining fields, using pull down menus where provided. All items marked with an asterisk are required. Special emphasis should be given to the ‘description of issues/concerns’ and ‘desired outcomes’ fields.
4. Click on the “Save and continue” button to save the entry and input another special request. Click on the “Save and Exit” button to save the entry and return to the main menu. Click on the “Exit” button to return to the main menu without saving the entry. Click on the “Reset” button to clear all values.



Input Organization Development Intervention Requests

Organization development intervention requests are appropriate when one or more issues have been identified, but a solution is unclear. Organization development interventions involve an assessment of the underlying cause(s) of issue(s), planning and implementing an effective solution and evaluating the results. An organization development professional will be assigned to work with the issue owner. Organization development activities are kept in strict confidence.

1. Click option 7 (Input organization development intervention requests).
2. Select the appropriate directorate and/or department from the provided pull down menus.
3. Complete the remaining fields, using pull down menus where provided. All items marked with an asterisk are required. Special emphasis should be given to the ‘description of issues/concerns’ and ‘desired outcomes’ fields.
4. Click on the “Save and continue” button to save the entry and input another organization development request. Click on the “Save and Exit” button to save the entry and return to the main menu. Click on the “Exit” button to return to the main menu without saving the entry. Click on the “Reset” button to clear all values.